

CNPA Network Online Ad Program



**A New Approach to
Reaching California Voters**



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The CNPA “Cal Banners” Network provides direct access to nearly 500 newspaper partners across California.



ITZBelden Partners work with CNPA to provide strategic and tactical guidance in maximizing the value and power of the Network.



Madden Media provides leading edge ad production and reporting tools for creating and managing online ad programs.



A New Network....

- ❖ CNPA offers a new network that is *a unique network...potentially every* daily and weekly newspaper in California

- ❖ Buy access to this audience by...
 - ✓ Run of Network
 - ✓ Run of NorCal
 - ✓ Run of SoCal
 - ✓ Any of 19 Congressional districts

- ❖ California news and information Web sites provide an unmatched “last mile” audience

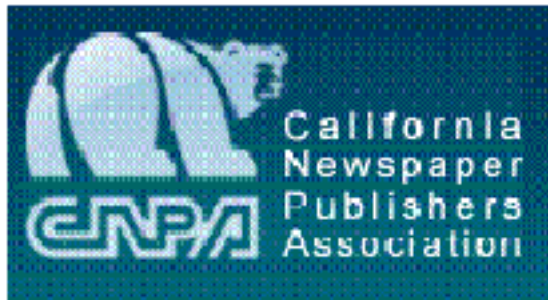


The Power of CNPA Network

- ✓ As the success of Google ad words shows, nothing is more important to the response to an ad than that it appear in an ***relevant and compelling context***. This makes newspaper Web sites perfect for political ads.
- ✓ Local newspaper Web sites go far in closing the loop on the ***“last mile” problem*** of message delivery.
- ✓ Local newspaper Web sites reach key active, intending voters and include large numbers of prospective ***“switch” voters who are independents or “leaning.”***



About CNPA



The **California Newspaper Publishers Association** is a trade association that has for 122 years protected the interests of newspapers throughout the state, from the smallest weekly to the largest metropolitan daily. CNPA has 800 daily, weekly and campus newspaper members. The mission of CNPA is to champion the ideals of a free press in our democratic society and to promote the quality and economic health of California newspapers.

CNPA with the cooperation of member newspapers, also offers single point access advertising opportunities in newspaper networks and newspaper websites, in print and online in California.



About ITZBelden Partners

ITZBelden Partners is a joint venture of ITZ Publishing of Portland, OR and Belden Interactive of San Francisco.

As a partner “team” **ITZBelden** has conducted hundreds of online and other research projects for media companies. As a strategic partner ITZ has driven tens of millions of dollars AND pageviews to client sites.

ITZBelden has ongoing strategic partner relations with many organizations and corporations, including American Press Institute, Inland Press Association, many state press associations. Publishing clients include hundreds of U.S. newspaper and TV ownership groups.

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About Madden Media



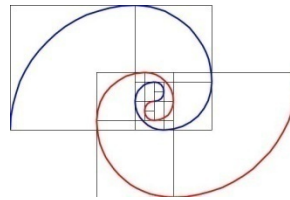
- In business for 34 years, Madden Media has 2,000 clients in 45 states.
- Reach and impact in 2009 – reached over 399 million consumers
- Early web adopter, integrating print with powerful online options including rich media banner ads, Search engine Optimization & Marketing that break industry standards and metrics
- 96 employees with award-winning Design team including 20 designers, eight flash designers, and four database developers
- Headquartered in Tucson, AZ



CNPA Network Survey



itz Belden



March 2010



Methodology

- ❖ We invited visitors to **California Banner Ad Network Newspaper Web sites** to participate in an **online survey**.
- ❖ The survey went live **March, 2010** and is on-going.
- ❖ Data from **380 maximum site visitor** interviews in this report – 90% of Respondents from California.

Survey Goals

- ❖ Profile active **California Banner Ad Network Newspaper Web sites** visitors
- ❖ Assess their **frequency and behaviors** at **California Banner Ad Network Newspaper Web sites** and media habits
- ❖ Examine **opportunities** for political advertising as to:
 - ✓ Political Preference
 - ✓ Voting Intentions
 - ✓ Gubernatorial Preferences
 - ✓ Party Affiliation

Some Key Points...

- ✓ Strong audience demographics
- ✓ Predominantly local area audiences
- ✓ Long-term, loyal audiences
- ✓ High visits frequency among Core Audience visitors
- ✓ Savvy Internet users
- ✓ Strong purchase intentions in many categories
- ✓ Very strong political participation.



CNPA Audience

Belden Projection March 2010 -- 12.5MM + adults

Every month CNPA Member sites generate over 500 million pageviews—as big as NYTimes.com

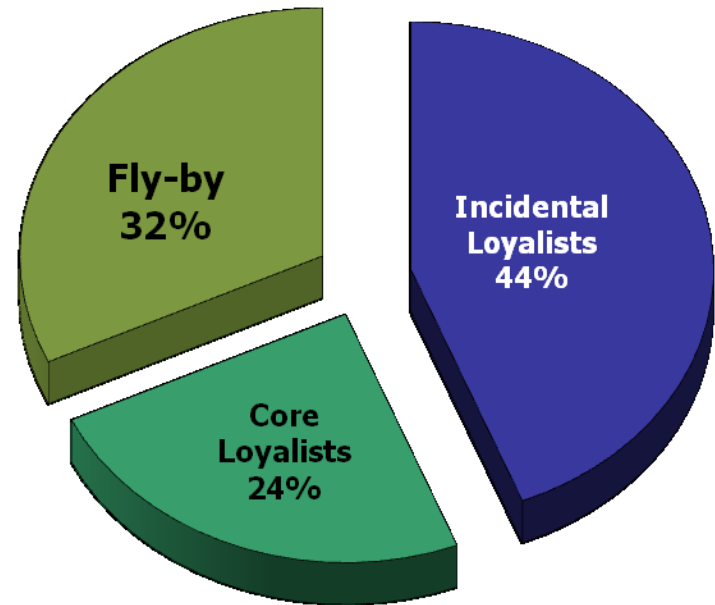
CNPA Member Sites' Visitor Prelim Projections

Fly-bys (One visit only):	32%
Incidentals(1-3 days):	44%

Core (19+days): 24%

NOTE: FLY-BY ABSOLUTE NUMBERS AND PROPORTIONS CAN VARY DRAMATICALLY FROM MONTH TO MONTH.

Preliminary Projections



Incidental = 3 or fewer visits in month
Core = 4 or more visits per month



February 2010

***Preliminary Projected Total Audience Reach:
12,500,000***

***Preliminary Projected Loyalist Audience Reach:
8,500,000***

California

- | | |
|-------------------------------------|------------------|
| • Local Population | 26MM |
| • In-State Loyalist Audience | 7,650,000 |
| • In-State Loyalist Reach | 29% |

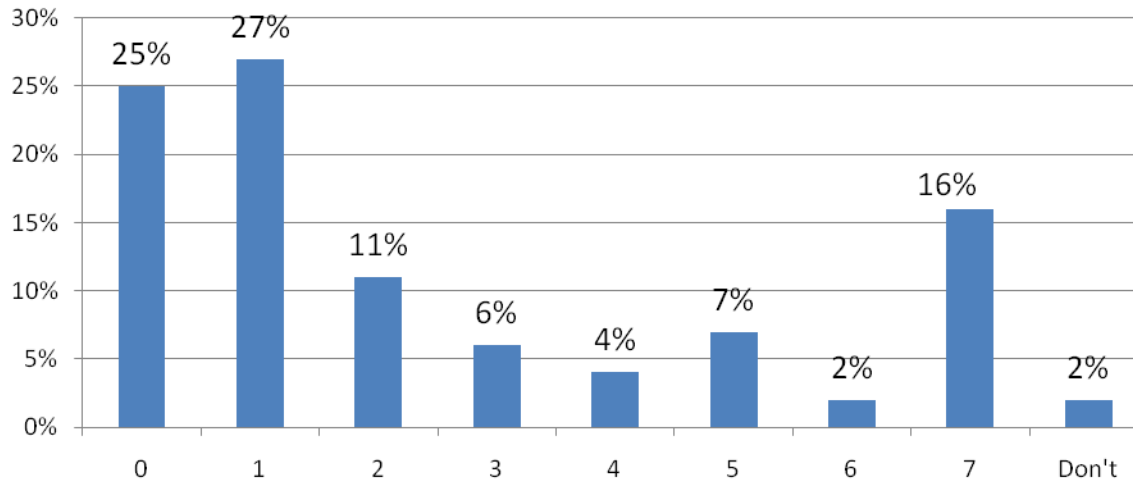
State of

Estimates are for a standard 28-day month
PRELIMINARY PROJECTION N = 380



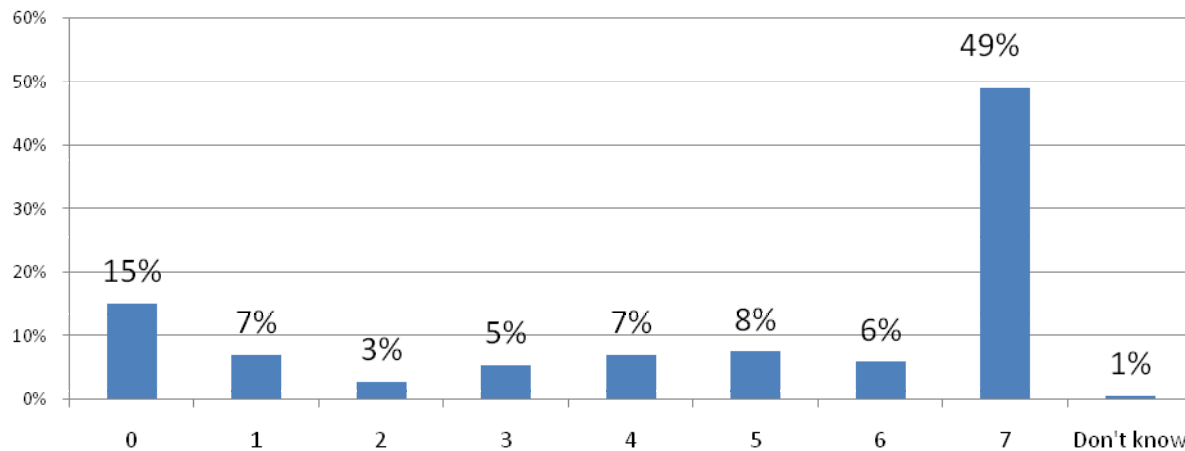
Very different Use Patterns

Days Visit CNPA Partner Weeklies



Sample Base: Weeklies Respondents

Days Visit CNPA Partner Dailies



Sample Base: Dailies Respondents Projections

3. Over the past 7 days, not including today, how many days did you do any of the following? (Check as many as apply.)

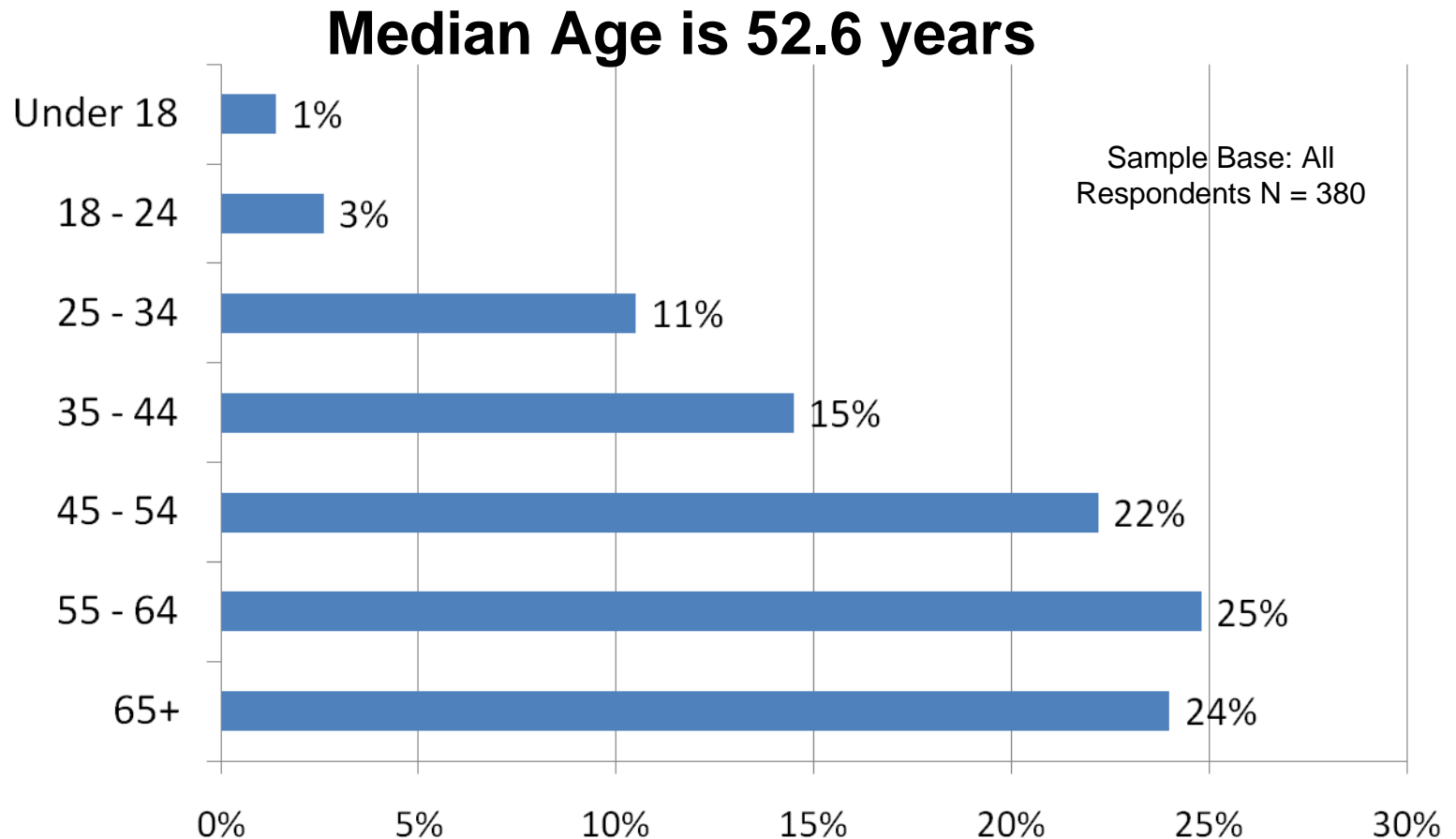


Respondent Demographics

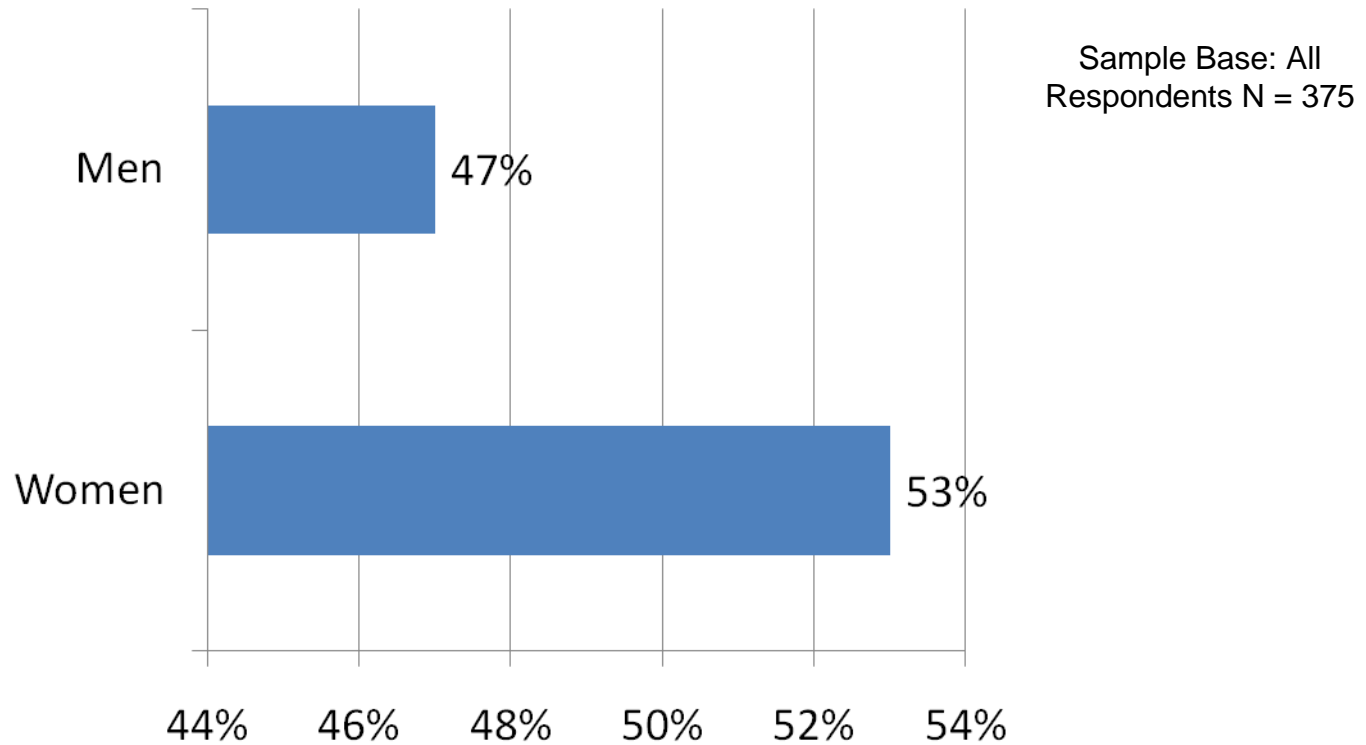
Profile of all CNPA Partner Sites Visitors

	CNPA Partner Sites Respondents March 2010 (All N = 380 Max.)
Gender	47% Men 53% Women
Median Age (adults)	52.6 Years
Median Income	\$59,950
Education (Coll. Grad.+)	46%
Married	58%
Currently employed	59% (24% retired)
State of California	90%

62% of visitors are 35-64 years old



Visitor base skews slightly female



Demographic Summary

In-California Resident	90%
Currently Employed	58%
White-Collar Employment	42%
Minority Identity	20%
POLITICAL	
Registered to vote	93%
Intend to vote next election	94%
Democrat/Republican	46%/30%

7-Day Media Use

		All (N = 362 Max) N Days/% +1 Day
Use the Internet		6.4 Days/99%
Visited this site		3.1 Days/79%
Visited other local or regional news sites		4.1 Days/88 %
Visited other local or regional information sites		3.7 Days/86%
Read or looked into a printed copy of a local daily newspaper		3.5 Days/78%
Read or looked into a printed copy of a local community weekly newspaper		2.3 Days/70%

3. Over the past 7 days, not including today, how many days did you do any of the following?



Online Frequency/Access

	All N = 359 Max
4. Over the past 30 days, not including today, how many days have you visited this site? (Loyalist Audience)	17 Days
5. When was the first time you visited this site?	<u>1 Year + : 46%</u>
10. On an average weekday (Monday-Friday), from which locations do you usually access this site?	Home: 77% Office: 53%

Major Dailies

Print & Web Readership

Enterprise	Print (N = 343)	Web (N= 335)
<i>Los Angeles Times/LATimes.com</i>	15%	27%
<i>San Francisco Chronicle/ SFGate.com</i>	12%	19%
<i>Riverside Press Enterprise /PE.com</i>	11%	16%
<i>Sacramento Bee/ SacBee.com</i>	7%	18%
<i>San Diego Union-Tribune/ SOSD.com</i>	5%	11%
<i>Los Angeles Daily News/ DailyNews.com</i>	4%	9%
<i>Orange County Register/</i>	2%	7%
<i>New York Times/ NYTimes.com</i>	10%	24%
<i>Wall Street Journal/ WSJ.com</i>	10%	18%

11. Over the past 7 days, not including today, which printed copies of these newspapers have you read or looked into? (Weekday refers to any edition, Monday through Friday.)

12. Over the past 7 days, not including today, which Web sites of these newspapers have you read or looked into? (Weekday refers to any edition, Monday through Friday.)

Participation...Growing Daily

California CNPA Dailies	
Total CNPA Partners	99
Serving ads as of 3/20	39



CNPA Dailies

CNPA Weeklies	
Total CNPA Partners	389
Serving Ads as of 3/25	55



CNPA Weeklies

13. Which newspaper's Web site are you visiting right now?

Print and online are key ad and information sources

	Sources Used N = 315
Other Internet	58%
Local daily or weekly community newspaper print edition (including inserts and store circulars)	52%
Store catalogs mailed to your home	38%
Store circulars mailed to your home	32%
Local daily or community newspaper Web site	25%
TV	23%
Weekly "Shoppers" (newspapers containing mostly advertising and little news)	22%
Magazines	19%
Yellow Pages	12%
Val-Pak coupons mailed to your home	12%
Radio	7%
Other	6%



15. When considering purchasing goods and services of over \$100 value, on which sources for advertising or information do you most rely? (Check as many as apply.)

Interaction with online ads

	Reactions N = 303
Ads that relate to the content of a page or your search criteria	42%
Sponsored links in a search result	37%
Display ad within a page (such as a banner ad)	36%
Email from a business being advertised	27%
Online video ad	14%
Ads that float on screen for 5-10 seconds and can, if the user elects, be bypassed	10%
Pop up ad	9%
Ads with sounds/video that start automatically	5%
Have not noticed or clicked	29%

18. Thinking about all the Web sites you visit and various types of ads you see online, which ads have you noticed and/or clicked. (Check as many as apply.)

Political Issues

	Issues N = 271
The Economy	85%
Jobs	83%
Education & Schools	76%
Health Care	70%
Taxes	48%
Illegal immigration	46%
Crime	45%
Environment	40%
Drugs	38%
Energy	30%
Iraq-Afghanistan Wars	23%
Terrorism	19%
Other	6%
None of the above	1%

21. What do you think are the most important issues facing residents of California today? (Check as many as apply.)

Participation

		Actions N = 269
Vote in a statewide election		82%
Vote in a local election		80%
Attend community or political events/rallies		37%
Make a contribution to a particular candidate or Proposition campaign		17%
Make a contribution to a political party or special interest group		16%
None of the above		14%

**22. In which of the following kinds of events and activities will you participate in the next 12 months?
(Check as many as apply.)**

Political Preferences

N = 269	Actions
- Strong Republican	13%
- Leaning Republican	9%
- Independent	19%
- Leaning Democrat	13%
- Strong Democrat	21%
- Other	4%
- Prefer not to answer	21%

23. Which of the following best describes your political preference?

Who is qualified?

N = 271	Issues
Jerry Brown	43%
Meg Whitman	32%
Dianne Feinstein	31%
John Garamendi	11%
Steve Poizner	11%
Gavin Newsom	10%
Tom Campbell	9%
Antonio Villaraigosa	5%
Deacon Alexander	0%
Other	4%
None of above	16%

24. The race for the election of the governor of California will be coming up soon. Among this list of candidates, who do you think is qualified to be governor of California? (Check as many as apply.)

In an “Open Primary” Vote for today?

N = 268	Issues
Jerry Brown	30%
Meg Whitman	27%
Dianne Feinstein	16%
Gavin Newsom	4%
Steve Poizner	4%
Tom Campbell	3%
John Garamendi	1%
Antonio Villaraigosa	1%
Deacon Alexander	0%
Would not vote	15%

25. If your choices for whom to vote were limited to this list and the election were held today, for whom would you vote?

Participation

Registered to Vote: **93%** Expect to Vote: **94%**

N = 269		Registered as...
Democrat		44%
Republican		31%
Libertarian		1%
Green		0%
Peace and Freedom		0%
Other		5%
Not a registered member of any party		18%



22. In which, if any, political party are you a registered member?

Technology Used

N= 296	Currently own/subscribe	Considering buying/subscribing
DVD Player	94%	1%
Digital Camera	89%	2%
Laptop or Notebook portable computer	79%	7%
Wi-Fi on laptop or home computer	71%	6%
Standard cell phone without Internet access	59%	2%
iPod or similar digital music device	53%	4%
Use GPS locator for driving, hiking, camping, etc.	46%	8%
DirecTV, Dish Network (TV), ZoomTV, or other Satellite TV	44%	5%
TiVo or other Digital Video Recorder	42%	6%
Standard cell phone with Internet access	42%	7%
Xbox, PlayStation, Wii, or other electronic game device	38%	8%
iPhone, Droid, Blackberry, or other "Smartphone"	35%	12%
Sirius/XM Radio, or other Satellite Radio	22%	6%
Kindle from Amazon, Apple iPad, or other "e-Reader"	10%	14%

33. Consumer Use of Technology/Access Which of the following new technologies do you subscribe to or currently own or use? (Select as many as apply.)



Technology Used

N = 296	Currently do/use registered/subscribe	Considering doing/using registering/subscribing
Access YouTube.com	63%	2%
Text messaging on cell phone	62%	6%
Facebook.com	58%	7%
Instant messaging (IM) on computer	42%	4%
Access online information like sports scores, headlines, stock quotes, etc. by cell phone or other mobile device	40%	5%
Access iTunes.com	39%	5%
Subscribe to Netflix	34%	7%
Online Games	34%	6%
Use Flickr, Kodak, or other online photo services	30%	7%
Use computer video camera for live telephone calls	27%	11%
Custom ringtones	26%	6%
Twitter.com	24%	8%
Buy phone apps for iPhone or other SmartPhone	22%	8%
Own vehicle with OnStar, Lojack, or similar system	21%	6%
MySpace.com	19%	2%

30. Which of the following technologies do you currently own or subscribe to? (Check one response for each item.)

Meg Spec Ads #1



MEG 2010
A NEW CALIFORNIA
MEG WHITMAN FOR GOVERNOR

CALIFORNIA IN CRISIS CREATE JOBS CUT SPENDING FIX EDUCATION A NEW CALIFORNIA

"Ronald Reagan once said that America is too great for small dreams. The same is true for our Golden State."

TALK TO MEG

FIX education

YouTube

BUILDING A NEW CALIFORNIA

A detailed campaign ad for Meg Whitman. It features a large portrait of her on the left. Above the portrait is a box with "MEG 2010 A NEW CALIFORNIA" and "MEG WHITMAN FOR GOVERNOR". To the right of the portrait is a quote: "Ronald Reagan once said that America is too great for small dreams. The same is true for our Golden State." Below the quote is an orange button that says "TALK TO MEG". At the top right, there are five navigation buttons: "CALIFORNIA IN CRISIS", "CREATE JOBS", "CUT SPENDING", "FIX EDUCATION", and "A NEW CALIFORNIA". On the right side, there is a video player showing a classroom with a large number "3" and the text "FIX education". A "YouTube" logo is in the bottom right of the video player. At the bottom of the ad, it says "BUILDING A NEW CALIFORNIA". A small red "x" icon is in the bottom left corner.

Direct Link to Live Ad:



<http://www.maddenmedia.com/richmedia/MegWhitman/>



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Thank you.



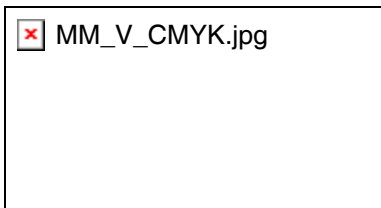
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